

Asia/Pacific

AP-1

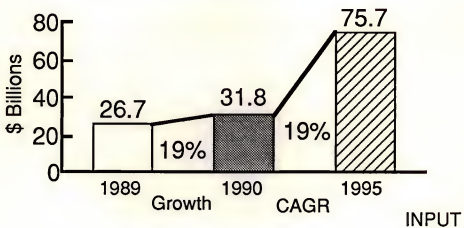
INPUT

Notes



Asia/Pacific

Market Forecast

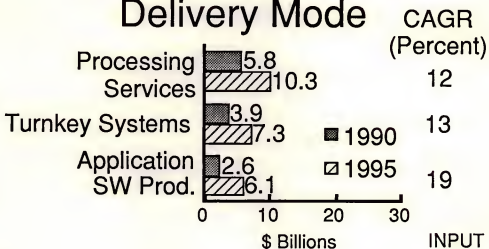


AP-2

Notes

Asia/Pacific

Market Forecast by Delivery Mode



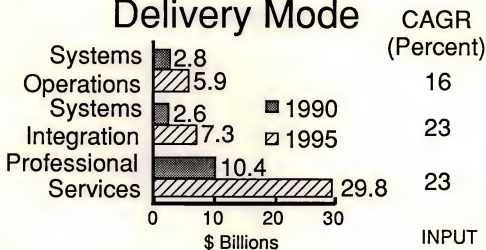
AP-3

Notes



Asia/Pacific

Market Forecast by Delivery Mode

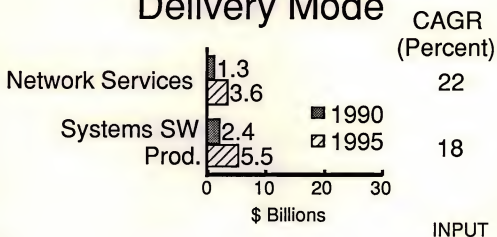


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Notes

Asia/Pacific

Market Forecast by Delivery Mode



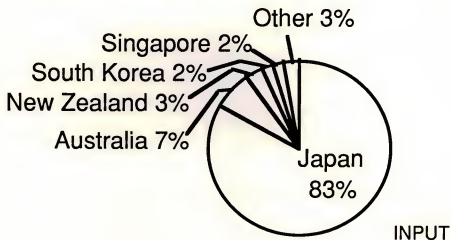
AP-5

Notes



Asia/Pacific

Market Distribution



AP-6

Notes



Asia/Pacific

Driving Forces/Inhibitors

- Strong economic growth
- Improving labor skills
- Nationalism
- Political stability varies
- Technology value recognized
- Small size of many markets

AP-7

INPUT

Notes

Asia/Pacific

Market Entry Considerations

- Diversity of region
- Alliances required
- International competitors
- Vendor stability—foreign and local
- Long-term view essential

AP-8

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Notes

Asia/Pacific

Areas of Opportunity

- Applications software products
 - CASE
 - Industry-specific—PC-based
- Turnkey systems—mini & PC

AP-9

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Notes

Asia/Pacific

Areas of Opportunity

- Systems integration & operations
 - Emerging markets
- Professional services—tied to software products
- New technology—transfer of skills

AP-10

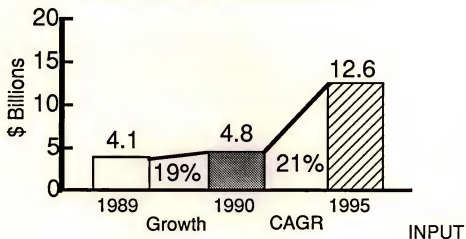
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Notes



Asia/Pacific (Excluding Japan)

Market Forecast

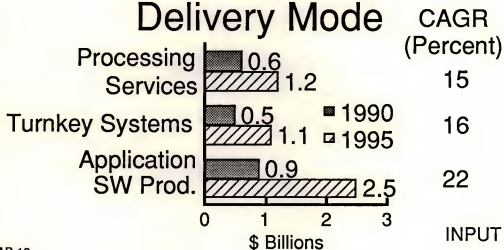


Notes



Asia/Pacific (Excluding Japan)

Market Forecast by Delivery Mode

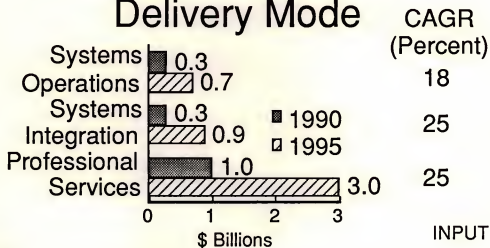


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Notes

Asia/Pacific (Excluding Japan)

Market Forecast by Delivery Mode



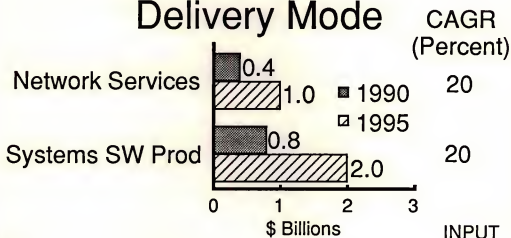
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Notes

5/7/91

Asia/Pacific (Excluding Japan)

Market Forecast by Delivery Mode



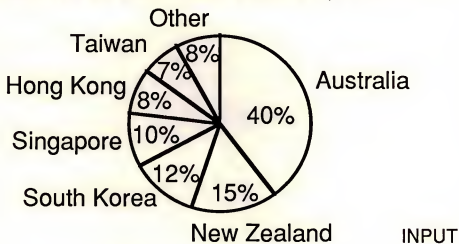
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Notes



Asia/Pacific (Excluding Japan)

Market Distribution, 1990



AP-15

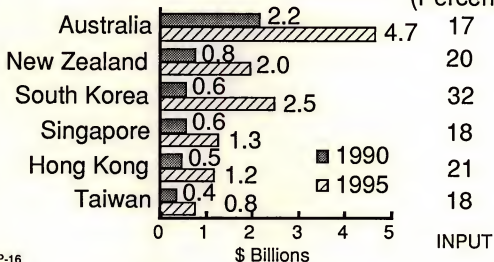
Notes



Asia/Pacific (Excluding Japan)

Market Forecast

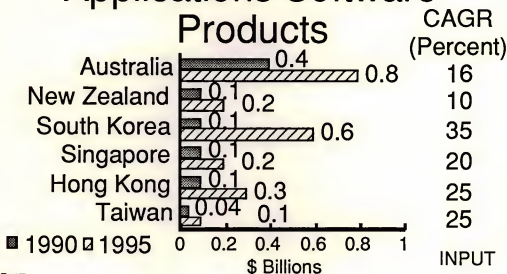
CAGR
(Percent)



Notes

Asia/Pacific (Excluding Japan)

Applications Software Products



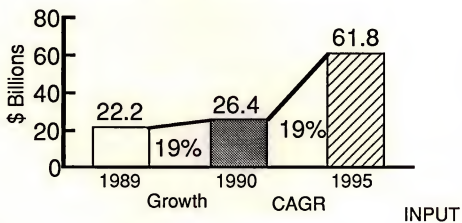
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Notes



Japan

Market Forecast



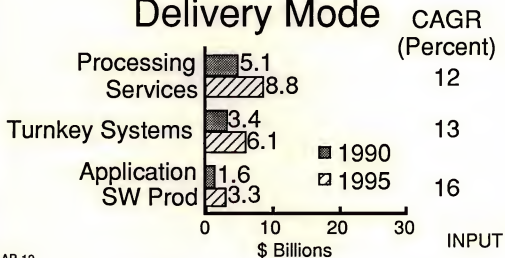
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Notes



Japan

Market Forecast by Delivery Mode



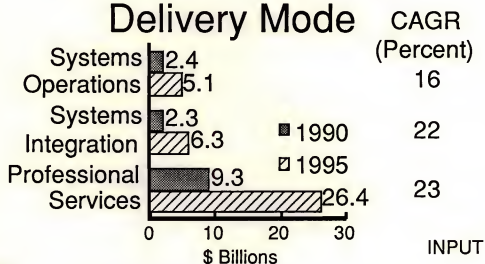
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Notes



Japan

Market Forecast by Delivery Mode



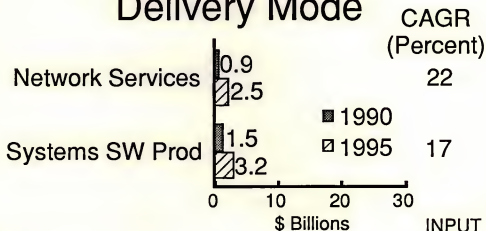
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Notes



Japan

Market Forecast by Delivery Mode

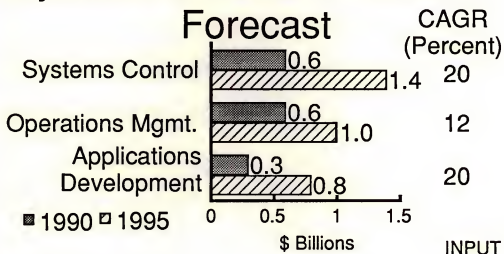


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Notes



Japan Systems Software Products Forecast



AP-22

Notes



Japan

Leading Information Services Vendors

Company	1989 Revenue (\$ U.S. Billions)
NTT Data	2.2
Nomuro Research	0.8
Hitachi IS	0.7

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Notes

Japan

Leading Information Services Vendors

Company	1989 Revenue (\$ U.S. Billions)
CSK	0.5
Japan Research	0.5
Hitachi Software	0.4

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Notes



Japan

Driving Forces

- Office automation
- Governmental investment/incentives
- Worldwide opportunities
- Software is an enabler of capabilities

AP-25a

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Notes



Japan

Driving Forces

- Culture
- Language inhibits foreign vendors
- Customized versus packaged software

AP-25b

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Notes



Japan

Market Entry Considerations

- High cost of entry
- Long-term view essential
- Kanji language
- Native representation essential

AP-26

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Notes



Japan

Areas of Opportunity

- Applications Software Products
 - Less than 10% purchased
 - CASE/RDBMS
 - DSS/EIS/Project Mgmt.

AP-27

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Notes



Japan

Areas of Opportunity

- License agreements
 - Local translation
 - Local marketing

AP-28

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Notes

